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# Targets for Transformation: a strategic plan for the Syracuse University Library, 2000-2005

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# Targets for Transformation

## A Strategic Plan for the Syracuse University Library 2000-2005

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# Preface

During the past eight months, the Syracuse University Library's Strategic Planning Steering Committee has worked to produce a strategic plan that will set the course for the Library for the next five years.

## What Is A Strategic Plan?

A strategic plan is a tool that enables an organization to revitalize itself and focus its efforts on accomplishing a set of mission-critical goals over a period of time. The Library began a strategic planning process in order to enhance its effectiveness within the University's intellectual and cultural life. According to University Librarian Peter Graham, Library planning is necessary "to shape our University's future information services and environment." A well-crafted plan that is intentionally implemented and consistently monitored will lead to success in strategic areas.

## Why Does the Library Need A Strategic Plan?

The plan will serve several purposes. Most importantly, it will establish the Library's direction entering the 21st century. The plan will provide a foundation for transforming Library services, technology, collections, and infrastructure to meet the evolving needs and demands of teaching, research, and scholarly communication. In addition it will develop among Library staff a set of commonly held values, and a shared sense of purpose and mission. The plan will propose a set of goals to focus our efforts and measure our success, and it will inform decision-making and enable action within a larger context known and understood by all.

Finally, another vitally important purpose of the plan is to establish a continuous planning process for the Library. Today's rapid-paced environment of technological advancements and evolving scholarly communication necessitates that the Library does more than respond to change. We must learn to manage and create change. The plan is intended to be dynamic, and over the next five years modifications certainly will be necessary to keep the plan relevant and on target. Thus the strategic plan becomes the starting point in an ongoing process.

## The Library's Planning Process

The Library's strategic planning process began in July 1999 with a three-day Library management team retreat. At the retreat the team focused on gaining an understanding of the steps of the planning process and then worked on several steps in particular: identifying aspirations, establishing planning assumptions, and conducting an environmental scan. In August the Library held staff town meetings to begin brainstorming about two questions: 1) in 2004, what do we want our users to be saying about the Library? and 2) in 2004, what do we want to be saying about the Library?

In October the University Librarian appointed the Strategic Planning Steering Committee (hereafter referred to as the Committee) charged with drafting a strategic plan and engaging the Library and its constituents in the planning process. Using input from the staff town meetings,

focus groups with faculty, staff, and students, and broad consultation with the University and library community, the Committee began crafting the plan.

The Committee began by discussing a vision for the Library, and defining core values, purpose, mission, and planning themes. Using this framework, the Committee generated goals and initiatives, incorporating additional suggestions from Library departments. The Committee also conducted focus group meetings facilitated by a professional independent consultant to gather input from students, faculty, and staff. In five sessions, including one for the University Senate's standing Committee on the Library, participants provided candid feedback on their experiences with the Library, and their needs and desires for future Library services. The Committee organized and analyzed these goals and initiatives, assigning priority and feasibility ratings. The resulting plan is built on a clear relationship among core values, purpose, vision, mission, and concrete goals and initiatives.

# Definitions of Terms

The following terms and definitions clarify the meaning of certain words or phrases that are used throughout the plan.

**Action Plan:** a plan for achieving an initiative developed with SUIQ tools, actions, and strategies.

**Action Team:** Library staff members who have the relevant knowledge, experience, and ability to contribute to accomplishing a particular initiative.

**Action Team Leader:** appointed by the Project Manager, this individual is responsible for leading the action team through development and implementation of the action plan. The Project Manager may or may not be the Action Team Leader.

**Core Values:** essential, basic beliefs that govern an institution's decisions both large and small.

**Feasibility:** ranking assigned to goals/initiatives based on the availability of needed resources.

**Gateway:** "… a metaphor for access to knowledge [that] evokes the image of crossing a threshold and entering a dramatically expanding world of information and learning; the library, as gateway, is the means by which students and faculty will locate and use this information. The gateway we envision is the constellation of services, the organization required for providing these services, and spaces dedicated to student learning."[1]

**Goal:** A broad statement that targets desired outcomes to achieve the Library's mission.

**Initiative:** A project that contributes to the achievement of specified goals.

**Initiative, Short-term:** an initiative that is actively in the implementation process by the end of the first year of the plan.

**Initiative, Mid-range:** an initiative that is actively in the implementation process by the end of the third year of the plan.

**Initiative, Long-range:** an initiative that is actively in the implementation process by the end of the fifth year of the plan.

**Mission:** a bold, audacious statement that draws an organization forward by connecting its values and purpose with concrete, time-specific goals and initiatives.

**Planning Themes:** broad areas within which action must be taken in order to achieve the Library's mission.

**Priority:** ranking assigned to goals/initiatives based on the degree of impact on users.

**Project Manager:** Individual who is responsible for a significant share of the resources involved in an initiative and who is accountable for the outcome. The Project Manager and the action teams design and implement action plans.

**Purpose:** a statement that derives from core values and stands as a timeless expression of an institution's "reason for being."

**Staff:** all Library personnel.

**Start date:** date when the action planning process for an initiative begins.

**Success indicators:** means used to assess outcomes.

**Vision:** the overarching target that sets the general direction and provides a view of the future that is ambitious and far-reaching, yet achievable.

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[1]Dowler, Lawrence. *Gateways to Knowledge: a New Direction for the Harvard College Library* (Cambridge: Harvard College Library, 1993), 4.

# Introduction

*The past, the present, and the future are really one. They are today.*
Harriet Beecher Stowe

When the Strategic Planning Steering Committee began its work, it intended to set bold, challenging goals and initiatives to establish the Library's trajectory into the next millennium. Harriet Beecher Stowe's statement above simply yet eloquently identifies the conundrum the Committee encountered: the future cannot be separated from the past or the present. It was necessary to set remedial and strategic goals to acknowledge that the impact of the recent past has significantly shaped the Library's present. The strategic plan articulates a vision for the Library's future, while acknowledging the influences of the past and present.

## The Recent Past

Syracuse University has weathered downsizing and retrenchment requiring sacrifices and hard choices. The Library experienced its own share of adversities. In spite of these hardships, however, Library staff achieved significant accomplishments including:

- developing a pioneering online system
- substantially improving Library fiscal management
- replacing the online catalog system twice, with attendant data migration, resulting in more and improved services to library users
- reconfiguring E. S. Bird Library to offer 24-hour study, improved vertical access, and consolidated service points
- acquiring internationally recognized special collections including those of Joyce Carol Oates, Rudyard Kipling, Stephen Crane, the Oneida Community, Albert Schweitzer, the Poushter fore-edge paintings, and the Odell cylinder recordings collection
- moving from a print-based reference service to a multi-faceted web-based service environment that includes CD-ROM and other electronic resources
- implementing a comprehensive preservation program
- obtaining grant awards from such agencies as the National Endowment for the Humanities, the Gladys Krieble Delmas Foundation, the Dana Foundation, the Institute of Museum and Library Services, the Goodrich Foundation, and the New York State Program for the Conservation/Preservation of Library Research Materials.

The severity of the adversities the Library faced contributed to its diminished ability to support the University's scholarly endeavors. A University-mandated 20 percent overall Library budget cut effectively reduced the number of staff, prevented robust acquisition of materials, caused significant serials cancellations, restricted technical support, and curtailed Library services. Perhaps most critical was the Library's diminished ability to take advantage of technological advancements for service delivery. As a result, SUL could not keep pace with the rapidly increasing abilities and expectations of its users. In addition, the deteriorating Carnegie building, home of the Science and Technology Library, continued an accelerating erosion of its facility and collections.

The adversities of the Library's recent past will be felt for years to come. One of the intentions of this plan is to remediate these effects and to re-establish SUL as a vigorous and integral component of the University community.

## The Present

Now is the time to begin transforming the Library. The digital revolution is well underway, calling for new library services, new methods for scholarly communication and information delivery, new partnerships and collaboration for effective teaching and research, and new organizational infrastructures to enable and support these changes. New leadership, both within the Library administration and the vice chancellor's office, have set the stage for forward movement into the twenty-first century. Throughout the University the emphasis on downsizing is giving way to a new focus on identifying strengths to realize the University's vision of being a leading student-centered research university. In the Library, we now seek to chart a course to a robust future within that University vision.

## The Future

This plan identifies targets for transformation that will move the Library forward. As a starting point, the Library must undergo a change in culture that will enable it to achieve the plan's goals and initiatives. This culture change will involve

- **Fully embracing the concept of the user-centered library**. Our users are the reason we exist and must be the focus of all that we do.
- **Concentrating on the value-added activities that are the Library's unique or incontrovertible responsibilities and that make an impact on our users**: selection, organization, access, and preservation of resources, and instruction in information literacy. We must set these unique, value-added activities as our highest priorities and look for creative means of accomplishing those functions that necessarily must assume a less prominent role.
- **Obtaining the necessary resources for important activities or positions.** The Library has relied on assigning additional responsibilities to individuals or departments already working beyond capacity and has not consistently secured additional funding or staff.
- **Focusing on the future and quickening the pace.** The Library must expect leadership from managers, administrators, and senior staff, and expect decision-making in a much more timely manner. In the recent past, the Library's emphasis has been on coping and on managing daily operations. This focus does not promote the future-oriented perspective that is crucial in today's environment of constant change.
- **Encouraging risk-taking and creative dissent**, promote autonomy of action, allow failure as a vehicle for learning, provide for the delegation of authority, and insist upon individual accountability at all levels of the organization.
- **Establishing a strong collective identity and working as one whole organization.** A culture of cooperation and collaboration will result in common understandings, beliefs, and behaviors throughout the Library, and a staff working together to provide the most efficient and effective service to our users.

Syracuse University Library is proud of its past achievements, but recognizes that the future needs a renewed sense of purpose and vision in order to meet the needs of our users. This strategic plan, coupled with a continuous planning process, begins that revitalization and transformation.

## Implementation and Continuous Planning For the Future

Implementation of this strategic plan requires a process of continuous planning for several reasons. It is not possible to anticipate all the unexpected events that will undoubtedly occur during the next five years. Given that premise, it seems practical to base implementation on an inherently flexible process that will easily allow for additions and changes at both the goal and initiative levels. A process with that essential characteristic would be well suited to serve as the basis for the Library's continuous planning.

An individual or a single committee cannot possibly articulate and respond to all of the embedded issues and details that will emerge during the implementation of any one of the plan's initiatives. Implementing the plan will require sustained effort and collaboration throughout the Library. Successful implementation with high quality outcomes lies in teamwork and total staff involvement. In addition, the structure guiding the implementation and continuous planning process must provide continuity in oversight, broad monitoring on the Library-wide level, accountability and responsibility for budget and resource allocation, and the authority to make decisions. These are the current duties of the Library Cabinet.

## The Relationship of Continuous Planning to SUIQ

In the fall of 1999, Chancellor Shaw sent to the University a *BUZZWords* communiqué with the title: "Whatever happened to SUIQ?" Portions of that message state:

> "Whatever happened to SUIQ? Some of you can answer that question by saying: "It's very much alive here in my department." In your areas, SUIQ exists in its original form, perhaps with some modifications. You are actively involved in teams set up to either improve quality overall or to correct a problem that has surfaced. For others, SUIQ seems to be a thing of the past, something that has faded into the woodwork in favor of business as usual. But has it?"

> "SUIQ is…evolving and shifting its direction. Early on in the program, many people here put their worktime into separate categories. There was regular work and SUIQ work. And that was true for a while as people got used to this new method for improving processes. Now, though, the two categories have merged into one, which focuses on outcomes."

The Committee has based its strategy for implementation and continuous planning on those concepts expressed by the Chancellor. The application of the tools, techniques, and understandings gained from the Library's collective SUIQ experience will be crucial to the success of the strategic plan. The principles of providing comprehensive training, involving all staff, empowering individuals, crossing departmental lines for problem solving, learning process analysis techniques, and encouraging public thanks and recognition were particularly valuable.

As SUIQ evolves in the Library, staff will continue to use these principles in their daily work, including the accomplishment of strategic plan initiatives.

Implementation and continuous planning can be accomplished with one *process* that emphasizes flexibility, teamwork, ongoing improvements, and quality outcomes—this is the SUIQ process. Implementation and continuous planning also requires a *structure* that supports this process, and includes those attributes mentioned earlier: continuity in oversight, broad monitoring on the Library-wide level, accountability and responsibility for budget and resource allocation, and the authority to make decisions.

The SUIQ structure as it has developed in the Library does not support these attributes to the degree necessary. In addition, the Library's staff resources cannot sustain the existing SUIQ structure while successfully carrying out this ambitious strategic plan. Therefore, oversight of the strategic plan *including the integration of SUIQ processes and principles into action planning and implementation* will be the responsibility of the Library Cabinet. To that end, implementing the plan necessitates that current SUIQ groups conclude their work by September 1, 2000 and disband. Before disbanding, the Quality Council will forward to Cabinet any work that cannot be completed by that date, for consideration within the strategic plan. This will allow the Library to focus its resources on implementing the strategic plan.

## How Will the Implementation and Continuous Planning Process Work?

For the next five years, implementing the strategic plan becomes the Library's main, though not exclusive, focus. As noted, Cabinet in its capacity as the Library's planning group will be broadly responsible for monitoring, reporting, and discussing the plan's progress. The first step in the process is to identify and incorporate current work into appropriate strategic initiatives.

As new issues arise, Cabinet will discuss changes and/or additions to the plan, taking into consideration the strategic value and feasibility of the proposal, competing demands, and availability of resources. In addition, Cabinet will develop a process for staff to suggest new initiatives and/or changes to the plan. Through consensus at Cabinet and other appropriate venues, these suggestions and/or changes may be incorporated into the strategic plan. Strategies for tracking progress and communicating changes as they occur may include:

- Use of project management software
- Regular written reports on status of initiatives in the Staff Newsletter
- Web page dedicated to the Library's strategic plan including online suggestion box
- Departmental annual reports that include progress toward relevant goals and initiatives
- Annual Cabinet retreat to review progress and prepare for work on upcoming initiatives
- Town meetings to report on and celebrate progress and thank staff for their participation.

To describe the continuous planning process in general terms, each initiative will be assigned a project manager responsible for developing an initial proposal to submit for review by Cabinet. The initial proposal will identify the action team leader and forecast approximate deadline dates. Action teams will be drawn from all staff throughout the Library, based on relevant knowledge, experience, current involvement in the process or project, and ability to contribute to the accomplishment of the initiative.

When assembled, the action team will develop the action plan in detail. Templates for the action plan proposal and action plan are included in the appendices of this document. Project managers and action teams will receive refresher training on SUIQ tools, actions, and strategies prior to beginning the development of their action plan.

As the Chancellor stated, "SUIQ is…evolving and shifting its direction." In the Library, this evolution and shift in direction will be accomplished through the strategic plan implementation and continuous planning process.

# Planning Framework

In order for the Library to become a visionary organization[2], it must articulate the core values and purpose that form its guiding philosophy. The Committee's challenge was to use the foundation of the Library's core values and purpose to craft a mission statement that unifies and directs efforts for the next five years. The mission, accomplished through goals and initiatives, moves the Library toward its vision.

To provide an organizational framework for those goals and initiatives, the Committee developed six planning themes. Each theme identifies a critical area where change must occur, while providing a targeted vision for that area. Below are the components of the planning framework developed by the Committee.

## What are Core Values?

Core values are essential, basic beliefs that govern an institution's decisions both large and small. This entire plan stems from our commitment to a set of shared values.

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***Our Core Values:***

Syracuse University envisions itself as a leading, student-centered research university whose five core values of quality, caring, diversity, innovation, and service are pervasive and evident among all its members. As a member of the larger organization, the Library upholds these values as our own.

We in the Library also embrace the following values in recognition of our unique role within the University as information providers, guides, teachers, and caretakers of the human record.

- **Respect –** Valuing people's individuality and diversity.
- **Collaboration –** Enriching the academic community through effective partnerships.
- **Stewardship** – Ensuring a vigorous future for the Library through preservation of collections and responsible resource management.
- **Leadership –** Acting boldly with vision and courage, taking risks, innovating, and standing accountable.
- **Information Literacy** – Empowering people to locate, evaluate, and use information for lifelong learning.[3]
- **Intellectual Freedom –** Upholding unfettered access to ideas across time and cultures.[4]

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[2] Collins, James C. and Jerry I. Porras. Organizational Vision and Visionary Organizations (1991).

[3] Commission on Colleges, Southern Association of Colleges and Schools (SACS). Criteria for Accreditation, Section 5.1.2 [Library and Other Information Resources] Services. 10th ed. Dec. 1996. (URL:http://www.sacs.org/pub/coc/cri70.htm#SECTION IV)

[4] American Library Association Core Values Task Force Draft statement (11/21/99) (URL: http://www.ala.org/congress/corevalues/draft.html)

## What is a Purpose Statement?

A purpose statement derives from core values and stands as a timeless expression of an institution's "reason for being."

> ### *Our Purpose:*
>
> To build and organize enduring accessible collections and to provide expert services that promote scholarship, learning, and discovery**.**

## What is a Mission Statement?

A mission is a bold, audacious statement that draws an organization forward by connecting its values and purpose with concrete, time-specific goals and initiatives.

> ### *Our Mission:*
>
> By 2005, we will transform the Library into the University's primary gateway for scholarly information. To accomplish this mission we must:
> - develop and sustain a highly user-centered culture
> - secure staff, facilities, technology, and funding that support and promote this new culture
> - deliver information literacy programs that enable effective use of our services, collections, and resources.

## What is a Vision Statement?

A vision statement is the overarching target that sets the general direction and provides a view of the future that is ambitious and far-reaching, yet achievable. The Library's vision statement provides a snapshot of the Library transformed.

> ### *Our Vision:*
>
> Our vision of Syracuse University Library--its people, services, collections, and facilities--is of a nationally significant research library that understands the needs of its users and has actively developed the resources and methods to meet those needs now and in the future.

## What are Planning Themes?

Planning themes are broad areas within which action must be taken in order to achieve the Library's mission. They provide framework for organizing goals and initiatives, not a rigid demarcation of territory or accountability. Goals and initiatives within one theme will be related to those in other themes.

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### Our Planning Themes:

1. **Information Technology (IT):** Choose, employ, and fully support tools and applications from both current and emerging technologies that will "enable meaningful navigation through and exploitation of information resources"[5] required by users and staff.

2. **User Services:** Provide and promote expert user services that are available at the time and place of need.

3. **Collections, Preservation, and Access:** Select, organize, preserve, and provide access to collections in all formats that fully support Syracuse University's teaching and research activities.

4. **Staff and Organizational Development:** Continually support, develop, attract, and retain a highly skilled and qualified staff who are committed to transforming the library. Develop the Library to become a more responsive, flexible, and effective organization.

5. **Physical Space:** Recreate our physical spaces to transform the library into an inviting, effective environment for exploration and discovery, study and reflection, and the exchange of ideas.

6. **Communication and Development:** Enthusiastically promote the Library to increase its visibility and presence on and off campus. Actively seek and secure greater financial support from a wide variety of sources both internal and external to the University.

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[5] Greenstein, D. "Creating digital library services: key challenges." *CLIR Issues*, no 14, Mar/Apr 2000 pg. 3,7

# Strategic Plan at a Glance

**Planning Theme 1: Information Technology (IT):** Choose, employ, and fully support tools and applications from both current and emerging technologies that will "enable meaningful navigation through and exploitation of information resources"[6] required by users and staff.
>  **Goal 1.1: Information Technology Planning**
>  **Goal 1.2: Information Technology Implementation**

**Planning Theme 2: User Services:** Provide and promote expert user services that are available at the time and place of need.
>  **Goal 2.1: Information Literacy**
>  **Goal 2.2: Service Culture**
>  **Goal 2.3: Digital Centers**
>  **Goal 2.4: Assistive technology and related services**

**Planning Theme 3: Collections, Preservation, and Access.** Select, organize, preserve, and provide access to collections in all formats that fully support Syracuse University's teaching and research activities.
>  **Goal 3.1: Collection Development**
>  **Goal 3.2: Digital Archiving**
>  **Goal 3.3: Preservation**
>  **Goal 3.4: Access**
>  **Goal 3.5: National Participation**
>  **Goal 3.6: Copyright and scholarly communication**

**Planning Theme 4: Staff and Organizational Development.** Continually support, develop, attract, and retain a highly skilled and qualified staff who are committed to transforming the library. Develop the Library to become a more responsive, flexible, and effective organization.
>  **Goal 4.1: Personnel Infrastructure**
>  **Goal 4.2: Staff Training and Development**

**Planning Theme 5: Physical Space.** Recreate our physical spaces to transform the library into an inviting, effective environment for exploration and discovery, study and reflection, and the exchange of ideas.
>  **Goal 5.1: Facilities**

**Planning Theme 6: Communication and Development.** Enthusiastically promote the Library to increase its visibility and presence on and off campus. Actively seek and secure greater financial support from a wide variety of sources both internal and external to the University.
>  **Goal 6.1: Communication**
>  **Goal 6.2: Development**

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[6] Greenstein, D. "Creating digital library services: key challenges." *CLIR Issues*, no 14, Mar/Apr 2000 pg. 3,7

Planning Theme 1: Information Technology (IT)
Choose, employ, and fully support tools and applications from both current and emerging technologies that will "enable meaningful navigation through and exploitation of information resources"[7] required by users and staff. The following goals and initiatives focus on this critical area:

## Goal 1.1: Information Technology Planning
[High Priority/High Feasibility]

*Goal*: **Increase and support library-wide efforts to incorporate information technology (IT) in planning, decision-making, daily operations, and service delivery.**

*Rationale*: **To insure and emphasize the Library's pre-eminent role as the information gateway for the University.**

*Success indicators:*
- comprehensive IT plan in place no later than January 2002
- information gateway is in place by September 2002

## Initiatives:

1.1.1 Appoint a Director of Information Technology reporting to the University Librarian and serving on the Administrative Committee.

> **Project Manager (1.1.1):** University Librarian
> **Action Team Leader:** _____
> **Start date:** August 1, 2000
> **Short-term to mid-range initiative**

1.1.2 Plan and design the Library's information gateway.

1.1.3 Create and maintain a comprehensive IT plan (public and staff) aligned with the Library mission, considering such issues as:
- public access technology
- office computing
- broaden and strengthen staff skill set (See 4.2.2 and 4.2.3)
- coordination with Computing and Media Services (CMS)

1.1.4 Maintain effective partnerships with University Computing and Media Services and other relevant departments.

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[7] Greenstein, D. "Creating digital library services: key challenges." *CLIR Issues*, no. 14, Mar/Apr 2000 pg. 3,7.

1.1.5    Conduct ongoing, systematic review of information technologies relevant to higher education and recommend acquisition of those appropriate to SUL; ensure budgetary support.

**Project Manager (1.1.2-1.1.5):** _____
**Action Team Leader:** _____ **Start**
**date:** January 1, 2001
**Mid-range initiatives**

## Goal 1.2: Information Technology Implementation
[High Priority/Medium Feasibility]

*Goal:* **Ensure proactive application of the information technologies required to access and use a full range of information resources and services.**

*Rationale:* **Appropriate and effective information technology is critical to Library operations and the successful delivery of all library services.**

*Success indicators:*
- robust technological infrastructure in place and actively supported
- open desktop for staff
- system-supplied and customized management reports and statistics routinely available
- all library staff equipped with an individual personal computer
- active, ongoing partnership with CMS
- decrease in number of user complaints relating to Library technology

## Initiatives:
1.2.1    Bring SUMMIT to full performance capacity, e.g., reporting capabilities, electronic data interchange (EDI), OPAC forms and statistics.

1.2.2    Prioritize and deploy necessary information technology, based on systematic review of IT (See 1.1.5) and known needs.

1.2.3    Collaborate with other University departments and units to identify, implement and/or support campus-wide digital initiatives, e.g. Geographic Information Systems (GIS), digital dissertations, digital archiving of University publications.

**Project Manager (1.2.1-1.2.3):** Head, Information Systems Department
**Action Team Leader:** _____ **Start** **date:**
August 1, 2000
**Short-term to mid-range initiatives**

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Planning Theme 2: User Services
Provide and promote expert user services that are available at the time and place of need. The following goals and initiatives focus on this critical area:

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## Goal 2.1: Information Literacy
[High Priority/Feasibility--specific to each initiative]

*Goal:* **Provide every SU student with the opportunity to acquire information literacy skills.**

*Rationale:* **Information literacy contributes to lifelong learning, which is increasingly necessary for success in today's world. Library staff have unique expertise in information access and evaluation and in providing information literacy instruction. We must enhance collaborative efforts with faculty to this end.**

*Success indicators:*
- information literacy program coordinated across the Library
- increase in the number of course-integrated instruction sessions
- increase in the number of online tutorials offered
- increase in the number of one-on-one orientations conducted for all new faculty members
- demonstrated effectiveness by library instructors in use of educational technology and instructional design concepts

## Initiatives:
2.1.1 Redefine the User Education Librarian position to that of Information Literacy Officer, possessing authority and staffing to develop and manage library-wide information literacy programs.

**Project Manager (2.1.1):** Associate University Librarian (AUL) for Public Services
**Action Team Leader:** _____
**Start date:** August 1, 2000
**Short-term initiative**

2.1.2 Focus the Information Literacy Program on efforts to increase librarian/faculty member collaboration and conducting a broader range of course-integrated instruction campus-wide.

2.1.3 Participate in the instructional efforts of faculty/teaching assistants by building upon the existing subject specialist structure to provide one-on-one orientation sessions for new faculty, expert input into curriculum and syllabus development, etc.

2.1.4   Create partnerships with appropriate campus resources, e.g., Instructional Design, Development & Evaluation (IDD&E) program, School of Information Studies (IST), to develop teaching skills and resource development

2.1.5   Develop a mentoring program for students, expanding outreach services to residence halls, Freshman Forum and Honors Programs, etc., to link them early in their academic life with an appropriate library advisor to assist and direct them in their academic research and information needs.

2.1.6   Develop and offer a credit-bearing information literacy course (e.g., Library 101) targeted at first-year students.

**Project Manager** (2.1.2-2.1.6): _____
**Action Team Leader:** _____ **Start**
**date:** January 1, 2001
**Mid-range initiatives**

## Goal 2.2: Service Culture
[High Priority/Feasibility--specific to each initiative]

*Goal:* **Develop a highly user-centered culture that guides the actions of Library staff and informs all Library policies, procedures, and decisions.**

*Rationale:* **To be a viable and responsive service organization, we must fully understand the needs of our users and deliver consistently excellent service in response.**

*Success indicators:*
- user surveys/feedback tell us that we are consistently meeting their needs, providing excellent service, etc.
- reconfigured public service points focused on core user activities
- staffing schedule consistent with users' needs
- initiate innovative reference service delivery, e.g., Netmeeting, webcams, tele-reference, instant messenger, chat software
- self-service options (e.g., recall, hold, interlibrary loan (ILL), copy requests, checkout, email notification)
- improved output options: e-books, ILL /document delivery, faxing, email, photocopying, printing; delivery and return of materials (e.g., Paging/courier service)
- reduction in user's complaints about the Bird Library entrance and other services

## Initiatives:
2.2.1   Conduct user needs assessment (affiliated and non-affiliated) and communicate findings to Library management to re-think and re-design all user services.

**Project Manager (2.2.1):** Associate University Librarian (AUL) for Public Services
**Action Team Leader:** _____
**Start date**: August 1, 2000
**Short-term initiative**

2.2.2   Create a more welcoming and effective Bird Library entrance--the first point of contact
        with Library users:
- remove turnstiles and explore alternative security measures
- provide appropriate staff training in customer service (See 4.2)
- document and train staff in interpreting and applying Library entrance policies
  and procedures
- design alternative staffing plans to include staff from other departments (See
  4.1.1)
- continue collaboration between Circulation and Reference Departments to
  identify and address information and referral issues

**Project Manager (2.2.2):** Head of Circulation, Head of Reference
**Action Team Leader:**          **Start**      **date**:
August 1, 2000
**Short-term initiative**

2.2.3   Collaborate with other campus departments and services to coordinate relevant activities,
        e.g., Supercard compatibility in the Library, use of SUnix account for access to library
        workstations.

**Project Manager (2.2.3):** Associate University Librarian (AUL) for Public Services
**Action Team Leader:**
**Start date**: August 1, 2000
**Mid-range initiative**

2.2.4   Investigate alternate sources of funding in order to reduce/eliminate fees for services.

**Project Manager (2.2.4):** Director of Library Development
**Action Team Leader:**          **Start**   **date**:
August 1, 2000
**Mid-range initiative**

2.2.5   Increase focus on services to students who might not be reached effectively through
        existing programs, e.g., Independent Study Degree Program (ISDP) students,
        international students, University College students, by acknowledging this responsibility
        through a specific staff assignment.

**Project Manager (2.2.5):** Associate University Librarian (AUL) for Public Services
**Action Team Leader:**
**Start date**: August 1, 2000
**Mid-range initiative**

## Goal 2.3: Digital Centers
[High Priority/Medium Feasibility]

*Goal***: Facilitate student/faculty/staff use and creation of digital information in collaboration with campus partners.**

*Rationale***: This is a logical evolution of the Library's services.**

*Success Indicators:*
- digital centers established
- student/faculty /staff are using the Library's facility to create digital resources
- SUL is viewed as the central place for digital resources and consultation

## Initiatives:
2.3.1 Establish digital resources consultation and development centers that include
- an electronic text center;
- a quantitative data center (e.g., Census and social science data);
- digitization equipment and assistance;
- digital publishing equipment and assistance;
- digital library development equipment and assistance [personal digital library, not developing SU Library];
- Geographic Information System (GIS) laboratory.

> **Project Manager:** _____
> **Action Team Leader:** _____
> **Start date:** contingent upon user-needs assessment
> **Mid-range to long-range initiative**

2.3.2 Collaborate with other campus departments and units to develop digital laboratories and smart classrooms in the Library

> **Project Manager:** _____
> **Action Team Leader:**_____**Start**
> **date:** contingent upon Library building project **Mid-**
> **range to long-range initiative**

## Goal 2.4: Assistive Technology and Related Services
[High Priority/Medium Feasibility]

*Goal:* **Integrate assistive technology and other related services throughout SUL to facilitate use of Library resources by individuals with disabilities.**

*Rationale:* **To provide equitable access to library resources and services for all users.**

*Success Indicators:*
- Library users with disabilities are able to access library resources

## Initiatives:
2.4.1   Deploy and support appropriate assistive technology throughout the Library.

2.4.2   Educate library staff to be aware of and sensitive to Americans with Disabilities Act (ADA) requirements. (See 4.2.2)

2.4.3   Ensure that the physical facilities (e.g., furniture, doorways, etc.) enable effective access to Library resources by users with disabilities.

**Project Manager(s) (2.4.1-2.4.3):** _____
**Action Team Leader:** _____ **Start          date:**
July 1, 2001 (contingent upon user-needs assessment) **Mid-range to long-range initiatives**

## Planning Theme 3: Collections, Preservation, and Access
Select, organize, preserve, and provide access to collections in all formats that fully support Syracuse University's teaching and research activities. The following goals and initiatives focus on this critical area:

### Goal 3.1: Collection Development
[Medium Priority/High Feasibility]

G*oal:* **Evaluate, build, and align collections with current University priorities through collaboration with schools, colleges, and academic departments.**

*Rationale:* **Provide collections and corollary resources essential to advancing SU teaching and research.**

*Success indicators:*
- core collections in all SU disciplines
- stronger and more uniform partnerships between faculty/academic departments and the Library
- collection policy statements for all disciplines
- additional funding for collections

### Initiatives:

3.1.1   Develop collection policy statements for all disciplines (fund codes).

3.1.2   Assess and build collections considering basic and research level needs.

3.1.3   Obtain additional funding to support acquisitions (See 6.2).

3.1.4   Align resources/allocations to support University-identified centers of excellence.

3.1.5   Evaluate and re-engineer the Collection Development organization.

3.1.6   Establish performance standards to ensure uniformity of bibliographer/selector excellence (See 4.1.7 and 4.2.2).

**Project Manager(s) (3.1.1-3.1.6):** _____
**Action Team Leader:** _____ **Start date:** January 1, 2001
**Mid-range initiatives**

## Goal 3.2: Digital Archiving
[Medium Priority/Low Feasibility]

*Goal:* **Initiate a digital archiving program for "born digital" scholarly publications generated by Syracuse University, in collaboration with faculty, CMS, and other partners.**

*Rationale:* **Digital archiving is a logical extension of the Library's traditional role of preserving the University's intellectual output.**

*Success indicators:*
- digital archiving program is implemented and ongoing
- ongoing collaboration between the Library and campus partners for digital archiving

## Initiatives:
3.2.1   Develop a methodology and implement a plan for digital archiving in collaboration with other campus partners.

  **Project Manager:** _____
  **Action Team Leader:** _____
  **Start date:** January 1, 2001
  **Mid-range initiative**

## Goal 3.3: Preservation
*Goal***: Staff the Library's preservation program to provide ongoing analog and digital preservation reformatting with less dependence on grant support.**

*Rationale:* **An ongoing preservation reformatting capability using non-grant-supported staff will enable the Library to preserve a broader spectrum of its general and special collections and to contribute more fully to national preservation efforts.**

*Success indicators:*
- feasibility established and strategy developed for ongoing preservation reformatting
- Library is able to undertake a broader range of local/regional/state/and national preservation initiatives

## Initiatives:
3.3.1   Determine feasibility of conducting ongoing preservation reformatting for print, non-print, and sound recording materials.

3.3.2   Lead and/or participate in regional, state, and national initiatives to advance SUL's role in, and contributions to, the preservation of scholarly resources in all formats.

  **Project Manager(s) (3.3.1-3.3.2):** _____
  **Action Team Leader:** _____ **Start date:** January 1, 2001
  **Mid-range initiatives**

## Goal 3.4: Access
[High Priority/Low Feasibility]

*Goal:* **Create integrated, organized, customizable, easy-to-use access to information resources in all formats.**

*Rationale:* **Respond to changes in scholarly communication, facilitate learning, discovery, and the creation of new knowledge.**

*Success indicators*:
- easier mechanics of accessing information resulting in fewer complaints
- increased use of resources
- customizable "My Library" information gateway in place

## Initiatives:
3.4.1   Create and support a seamless information environment that integrates searching of SUMMIT catalog and databases, Web and Internet resources, and multimedia resources.

3.4.2   Develop a "My Library" information gateway with personalized information space for customized access to resources and software in one secure place, and automatic notification of new resources and services based on a personal profile (i.e., SDI service).

3.4.3   Provide a variety of access options for on-site research and coursework, e.g., computer cluster, laptop loans.

3.4.4   Concentrate efforts on projects that improve the content and functionality of the online catalog, e.g., projects identified in the Library's 1999 Census of Cataloging Needs.

**Project Manager(s) (3.4.1-3.4.4):** _____
**Action Team Leader:** _____**Start**
**date:** January 1, 2001
**Short-term initiatives**

## Goal 3.5: National Participation
[Medium Priority/Medium Feasibility]

*Goal:* **Increase SUL participation in national and international research library initiatives.**

*Rationale:* **To take advantage of emerging opportunities for partnerships, to improve services to users, and to enhance the reputation of the Library on the national scene, improving our ability to recruit and retain highly qualified staff and become a desirable partner for digital and other initiatives.**

*Success indicators:*
- methodology for selection is implemented
- SUL is a partner in national projects

## Initiatives:
3.5.1    Determine projects to which SUL has already committed or should commit, e.g., Research Libraries Group (RLG) Cultural Materials Initiative, Scholarly Publishing and Academic Resources Coalition (SPARC), OCLC's Cooperative Online Resource Catalogs (CORC), Digital Library Federation (DLF).

3.5.2    Initiate participation in projects that SUL has selected based on findings from investigation, communicate activities to the campus community.

3.5.3    Create and implement a methodology to select future initiatives appropriate for SUL

**Project Manager (3.5.1-3.5.3):** University Librarian
**Action Team Leader:**                              **Start**
**date:** August 1, 2000
**Mid-range to long-range initiatives**

## GOAL 3.6: Copyright and Scholarly Communication
[High Priority/Medium Feasibility

*Goal:* **Establish the Library as a core resource on the SU campus for copyright information and policy, in partnership with campus stakeholders.**

*Rationale:* **To assist the campus community in understanding the relationship between copyright guidelines and regulations and the evolving scholarly communication process.**

*Success indicators:*
- faculty and students have a better understanding of copyright issues pertaining to teaching and research
- SU's exposure to copyright litigation is mitigated
- comprehensive copyright web site is in place

## Initiatives:

3.6.1   Work with campus stakeholders to establish and promulgate a University-wide copyright policy approved by the University's legal counsel.

3.6.2   Establish a copyright consultation and education program to inform and assist the campus community with issues relating to copyright.

**Project Manager (3.6.1-3.6.2):** Associate University Librarian (AUL) for Collection Development
**Action Team Leader:** _____
**Start date:** August 1, 2000
**Mid-range initiatives**

Planning Theme 4: Staff and Organizational Development
Continually support, develop, attract, and retain a highly skilled and
qualified staff who are committed to transforming the library. Develop the
Library to become a more responsive, flexible, and effective organization.
The following goals and initiatives focus on this critical area:

### Goal 4.1: Personnel Infrastructure
[High Priority/Feasibility--specific to each initiative]

*Goal:* **Build a diverse staff appropriate in number and skill sets to ensure that current and future faculty and student needs are met.**

*Rationale:* **Sufficient numbers of staff with appropriate skills are necessary for the Library to become more effective, efficient, and proactive.**

*Success indicators:*
- staffing is aligned with user needs
- job descriptions are current and method of updating is in place
- performance standards and core competencies for all staff are in place
- performance evaluation program is in place for all staff
- ongoing user surveys return positive results regarding staff performance
- recruiting is successful and number of vacancies is reduced
- salaries are competitive
- staff diversity is increased

### Initiatives:
4.1.1   Conduct a library-wide assessment of Library organizational structure, positions, and standing committees.

4.1.2   Determine appropriate organizational structure based on organization and user needs assessments.

4.1.3   Reallocate positions and fill vacancies based on organization and user needs assessments.

4.1.4   Provide competitive compensation.

4.1.5   Establish a more diverse library staff.

4.1.6   Determine appropriate composition of standing committees (e.g., Cabinet, etc.).

> **Project Manager (4.1.1-4.1.6):** University Librarian
> **Action Team Leader:**_____ **Start**
> **date:** August 1, 2000
> **Mid-range initiatives**

4.1.7    Produce current job descriptions and method of updating them.

4.1.8    Establish performance standards and core competencies for all staff.

4.1.9    Develop a performance evaluation program for all staff including upward evaluation (i.e., staff evaluation of supervisors).

4.1.10   Improve recruiting strategy and processes.

> **Project Manager (4.1.7-4.1.10):** Director of Administrative Services
> **Action Team Leader:** _____ **Start             date:**
> following complete organizational assessment
> **Mid-range initiatives**

## Goal 4.2: Staff Training and Development
[High Priority/Medium Feasibility]

*Goal:* **Provide all SUL staff with necessary training and development.**

*Rationale:* **To enable Library staff to excel in their work and to propel the Library forward.**

*Success indicators:*
- ongoing comprehensive training program is in place
- training needs are met in a timely manner

## Initiatives:
4.2.1    Appoint a staff development officer at 1 FTE (new position), reporting to the Director of Administrative Services, with sufficient authority and resources to lead and direct a Library-wide staff development program.

> **Project Manager (4.2.1):** Director of Administrative Services
> **Action Team Leader:** _____ **Start       date:**
> August 1, 2000
> **Short-term initiative**

4.2.2    Establish and support an ongoing, comprehensive training and development program with particular emphasis on:
- Customer service training;
- Technology training;
- Mentoring programs;
- Leadership development program.

4.2.3   Identify and incorporate other resources for training, including partnering with existing
        SU resources, e.g., Human Resources, Computing and Media Services (CMS), Center for
        Support of Teaching and Learning (CSTL), and external agencies (e.g., Onondaga
        Community College (OCC), Association of Research Libraries/Office of Leadership and
        Management Services (ARL/OLMS).

**Project Manager(s): (4.2.2-4.2.3):** _____
**Action Team Leader:** _____**Start**
**date:** January 1, 2001
**Short-term initiatives**

Planning Theme 5: Physical Space
Recreate our physical spaces to transform the library into an inviting,
effective environment for exploration and discovery, study and reflection,
and the exchange of ideas. The following goals and initiatives focus on
this critical area:

### Goal 5.1: Facilities
[High Priority/Medium Feasibility]

*Goal:* **Transform the library's physical space to create a more welcoming, aesthetically pleasing, comfortable, and functional environment.**

*Rationale:* **To make the Library a desirable, active, intellectual and cultural commons for the University.**

*Success indicators:*
- appropriate space for users and staff
- a variety of group and individual study spaces
- comfortable, functional, and ergonomic furniture
- comfortable, wired (i.e., Laptop ports), soundproof, group study areas
- quiet spaces for research, study, and reflection

### Initiatives:

5.1.1   Plan the redesign of Bird Library in collaboration with appropriate campus partners. Provide space for a Cultural Center/Intellectual Commons for community events, library programs e.g., lectures, films, student performances, etc.

      **Project Manager:** University Librarian
      **Action Team Leader:** _____
      **Start date:** in progress
      **Short-term initiative**

5.1.2   Assess comfort, convenience, safety, and aesthetic needs of the SU Library community, and implement modifications to address those needs (e.g., soft seating, café/snack area, quiet study areas, etc.).

      **Project Manager:** Director of Administrative Services
      **Action Team Leader:** _____ **Start date:** August 1, 2000
      **Short-term to mid-range initiative**

Planning Theme 6: Communication and Development
Enthusiastically promote the Library to increase its visibility and presence on and off campus. Actively seek and secure greater financial support from a wide variety of sources both internal and external to the University. The following goals and initiatives focus on this critical area:

## Goal 6.1: Communication
[High Priority/High Feasibility]

*Goal:* **Intensify communication and public relations efforts to heighten on- and off-campus awareness of the Library's activities.**

*Rationale:* **To increase use of the Library by informing our users of available resources and services thereby maximizing the University's investment in the Library.**

*Success indicators:*
- increased use of the Library
- on-campus constituents understand and place a high value on the importance of the library to their academic endeavors
- increased Library participation in partnerships and collaborations that contribute to the intellectual and cultural life of the University

## Initiatives:

6.1.1   Establish and staff an Office of Library Development, Public Relations, and Communications under the direction of the Director of Library Development (recruitment underway) responsible for overall communication and public relations.
- adjust Communications Coordinator reporting line to the Director of Library Development

6.1.2   Develop a comprehensive marketing/communication plan including strategies for internal and external communication.

**Project Manager (6.1.2):** Director of Library Development
**Action Team Leader:**_____**Start        date:**
Upon hiring of the Director of Library Development **Mid-range initiative**

6.1.3   Develop programming for a cultural center/intellectual commons for community events, library programs, e.g., lectures, films, student performances, etc. (See 5.1.1).

> **Project Manager:** Director of Library Development
> **Action Team Leader:** _____ **Start        date:**
> Upon hiring of the Director of Library Development **Ongoing initiative**

## Goal 6.2: Development
[High priority/High feasibility]

*Goal:* **Strengthen the Library's fiscal position.**

*Rationale:* **A stronger fiscal position will transform the Library's physical facilities, shore up its research collections, and provide dynamic new services to students and faculty.**

*Success indicators:*
- increased funding from the University
- increased funding from a variety of external sources, including foundations, federal and state agencies, and individual donors
- staff routinely apply for and obtain grants

## Initiatives:

6.2.1   Undertake development needs assessment.

6.2.2   Secure funding for building project (i.e., "Big Bird").

6.2.3   Secure funding for collections endowments.

6.2.4   Secure funding for position endowments.

6.2.5   Identify potential projects for external funding support in collaboration with the AUL for Collection Development, Curator of Special Collections, and other appropriate staff.

6.2.6   Maintain effective partnership with the University's offices of Development, Alumni Relations, and Sponsored Programs.

6.2.7   Oversee operational aspects of Library Associates.

> **Project Manager (6.2.1-6.2.7):** Director of Library Development
> **Action Team Leader:** _____ **Start        date:**
> Upon hiring of the Director of Library Development **Ongoing initiatives**

# Appendices

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    1.1.    Final charge
    1.2.    Feasibility and Priority Matrix
    1.3.    Goals and Initiatives Sorted by Start Date, Project Manager, and Priority
    1.4.    Meetings on Core Values, Purpose, Mission, and Strategic Themes (handouts and compilation of comments without attribution)
    1.5.    Focus Groups—compilation of comments
    1.6.    Action Team Proposal Template
    1.7.    Action Plan Proposal Template

2.  SU and SUL Background Material
    2.1.    Library town meetings, August 1999
    2.2.    Carnegie Gateway (article in Library Connection by P. Graham)
    2.3.    Employee satisfaction survey
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    2.10.   Library Annual Reports
            2.10.1. Annual report 1997/98 (last report from D. Stam)
            2.10.2. Annual report 1998/99 (first report from P. Graham)
    2.11.   University Senate Committee on the Library Final Reports (1997/98, 1998/99)
    2.12.   Vice-Chancellor and Provost Freund's 20/20 vision address
    2.13.   BuzzWords "Whatever Happened to SUIQ?"
    2.14.   Chancellor Shaw's article in the Record "Shaw speaks to the future"

3.  Other Strategic Plans
    3.1.    Association of College and Research Libraries
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    3.3.    Brown University Library
    3.4.    Cornell University Libraries
    3.5.    Evans General Libraries, Texas A&M University
    3.6.    Harvard University Library
    3.7.    Howard-Tilton Memorial Library, Tulane University
    3.8.    New Mexico State University Library.
    3.9.    University of Arizona Library
    3.10.   University of Chicago Library
    3.11.   University of Iowa Libraries
    3.12.   University of Tennessee/Knoxville
    3.13.   University of New Mexico Library
    3.14.   University of Saskatchewan Libraries
    3.15.   University of Wisconsin/Madison Library

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